



With your help, United Way raised more than **\$16 million dollars** to support 100 vital programs and initiatives provided by our community partners last year. Of the amount raised, 90% was invested right back into the community in a variety of meaningful ways, including programs that are sustainable and produce lasting results. One-in-five residents, a quarter of a million people, participate in at least one United Way funded program — that’s your colleague, neighbor, friend or family member.

**United Way of Palm Beach County funded programs fight for access to the basics: a quality education, a place to live, financial stability, good medical care, and enough to eat.**



**\$22M Total Economic Impact** (2017-18)

### United Way’s Hunger Relief Initiative Made Significant Strides in Alleviating Hunger in Our Community

- **6,817** weekend meal backpacks were distributed to Palm Beach County School District students.
- United Way of Palm Beach County received **\$50,000** a year for three years from the Farris Foundation to increase the total cubic feet of cold storage for pantries within Palm Beach County. This will allow more food to be distributed year-round as well as help increase the overall amount of food that can be distributed by the pantries.
- **1,022,033** meals were served to children through The School District and Palm Beach County Youth Services in the summer of 2017.



[UnitedWayPBC.org](http://UnitedWayPBC.org)



## TOCQUEVILLE *IMPACT* | NOVEMBER 2018

### A Message from our CEO, Dr. Laurie George Celebrating our Work



For 90 years, United Way of Palm Beach County has been a trusted partner advocating that everyone deserves access to the basics. We have distributed more than \$300 million to our community since 1929. Today, we invest in 100 local programs and initiatives helping one-in-five residents.



Our continued success is driven by a relentless commitment to our mission coupled with an ability to respond to changing circumstances and events. We recognize that we are only as strong as our generous donors.

One of the major changes we are facing in 2018 is the Tax Cuts and Jobs Act, which nearly doubled the standard deduction for individuals and families. Experts are projecting a 3-5% decrease in charitable contributions, and many donors are reevaluating the timing of their gifts. Some are considering “bunching,” which involves making multiple years’ worth of donations in a single year to meet the new tax benefit threshold. However, this tactic may have a negative impact on local charities as donors will then skip the next year or two of giving making it difficult for planning and meeting unexpected needs.

United Way of Palm Beach County offers a full-service Donor-Advised Fund that allows donors to bunch donations, manage all charitable gifts in a single location, and receive the tax benefits immediately. Gifts to Donor-Advised Funds can be in the form of cash, marketable securities and other

acceptable, complex assets. When you contribute to our Donor-Advised Fund, you are making an irrevocable donation to United Way of Palm Beach County.

**For more information, please contact:**  
**Danielle Hanson, VP of Major Gifts & Planned Giving, at 561-375-6649**



# Your Investment By the Numbers



## "Housing Stabilization" IMPACT

- ▶ Last year, 179 households were served by the Housing Stabilization program.
- ▶ 531 clients were served.
- ▶ Families received financial assistance to pay past-due rent, mortgage, and utilities.



## "Targeted Case Management Program" IMPACT

- ▶ 288 clients were served with wraparound services, including referrals to community resources, prevention of out-of-home placement, advocacy in legal and academic settings, and community outreach.
- ▶ Helped 96% of their clients obtain health insurance by the time they were discharged from the program.



## YOUR IMPACT



### ADOPT-A-FAMILY Client Story

KC, a single mom of three, turned to Adopt-A-Family in January 2018 seeking assistance with rent after Hurricane Irma caused her employer to close for nearly three weeks and her paycheck was delayed. This unexpected gap in income caused her to fall behind on rent, but KC had a stable employment history and was determined to care for her two young children.

Though KC was making payments towards her rent once her pay schedule at work returned to normal, she did not have the resources to catch up on rent without assistance. She became extremely worried about her ability to continue to care for her three children until she saw a news segment about Adopt A-Family. KC had never requested assistance from a social service agency before but decided to contact Adopt-A-Family since she was in a dire circumstance. They immediately responded and enrolled KC in their Housing Stabilization program which paid her past due rent to prevent eviction, provided case management services for the entire family as well as budget counseling and homeownership coaching. Thanks to the services provided by Adopt-A-Family, KC and her family are on track for self-sufficiency.

## YOUR IMPACT

### COMMUNITY PARTNERS Client Story

Ann, a single mother of three came to the Parent-Child Center, a member of Community Partners, for housing assistance as she and her children were living out of a car and storage unit. Though currently employed, the family became homeless due to Ann losing her job in 2017 and she could not catch up enough to afford housing. The Parent-Child Center was able to provide Ann and her children with temporary housing, employment resources and referrals that would allow her to become self-sufficient and successful. Staff at the Parent-Child Center connected her to Housing Partnership, another member organization of Community Partners, and started the process of applying for supportive housing. Ann and her children were finally placed into permanent housing and she was able to afford rent. The family was connected to several additional resources within the community, including mental



health counseling, information on returning to school at Palm Beach State College, and budgeting classes. The services and referrals the Parent-Child Center was able to provide Ann and her children demonstrates the power of United Way funded nonprofits working together to improve lives in Palm Beach County.

## Michael T. Dunn Tocqueville Society Cabinet Chair



I started my career in banking over 30 years ago. As I joined the bank with a dozen or so other wide-eyed college graduates about to undertake a year-long management training program, we attended a three-day orientation. There are two parts of that orientation that shaped my life. The first was a presentation on a relatively new product called the 401K that could help you accumulate wealth over time. The company even matched your contributions. The second was a presentation by the local United Way chapter. They stressed the impact of a healthy community on the viability of local businesses and said just a dollar a pay check could make a difference. That day I signed up for a dollar a pay check. Over the years, I got involved as a volunteer with United Way funded agencies and truly saw the impact of their work. So, each year when I got a raise, so did United Way.

United Way has been my focus for giving over the last 30 years because I believe strongly in their mission and their process. I know United Way brings a broad perspective to the issues affecting our community, tries to understand the root cause of those issues, and tries to efficiently fund programs that will have a lasting, positive effect for ALL residents of Palm Beach County.

*That's Why I Give to United Way.*



# TOCQUEVILLE SOCIETY MEMBERS

## MILLION DOLLAR ROUNDTABLE \$1,000,000 and above (Cumulative Giving)

Countess Henrietta de Hoernle\*  
Mrs. Sara Jo Kobacker  
Mrs. Mary Ann Perper  
Mr. John F. Scarpa  
Mr. and Mrs. Raymond Zimmerman

## NATIONAL SOCIETY \$100,000 - \$999,999 (Annually)

Mrs. Sara Jo Kobacker  
Mr. and Mrs. Raymond Zimmerman

## ORDER OF EQUALITY | \$50,000 - \$74,999

Anonymous

## ORDER OF LIBERTY | \$25,000 - \$49,999

Anonymous  
Mr. Robert M. Beren  
Mr. and Mrs. Stephen and Gabriella Demeritt  
Mr. and Mrs. George Giguere  
Mr. and Mrs. William J. Gilbane, Jr.  
Judith and Tom Giuffrida  
Mrs. Martha B. Hartfiel  
Mr. James Robo  
Mrs. Ramona Ann Spears  
Mr. and Mrs. Frank E. Walsh

## ORDER OF INDEPENDENCE | \$15,000 - \$24,999

Anonymous (2)  
Mr. and Mrs. Barney Barnett  
Mr. Moray P. Dewhurst  
William and Mary Donnell  
Mr. George T. Elmore  
Mr. and Mrs. Brett and Brijin Frazee  
Ms. Karen Leikert  
Mr. Stephen C. Moore  
Lee and Jenny Owen  
Mr. Armando Pimentel  
Mr. and Mrs. Del Williamson

\*Deceased

## SOCIETY MEMBERS | \$10,000 - \$14,999

Anonymous (2)  
The Azrieli Foundation  
Mr. Miguel Arechabala  
Gene and Joyce Bolton  
Mr. Larry E. Brown  
Mrs. Fabiola Brumley  
Mr. Dan Cane  
Mrs. Deborah H. Caplan  
Mr. and Mrs. Alexander R. Castaldi  
Ms. Trudy Crowetz  
Ms. Denise Crumm  
Ms. Julie Fisher Cummings  
Frank and Helga Doyle  
Michael T. and Ruth Ann Dunn  
Ray and Nancy Faloon  
Mr. Alfonso "Alfy" Fanjul  
Mr. Jose "Pepe" Fanjul  
Tricia and David Foley  
Madeline and Sidney Forbes  
Mr. Sam A. Forrest  
Ms. Edith Di Francesco  
Mr. and Mrs. David G. Frey  
Dr. Laurie J. George  
Mr. Cary Ginter  
Mr. Richard Glasser  
Mr. and Mrs. Jeff Greene  
Kenneth L. and Summer J. Groves  
Mr. Naren K. Gursahaney  
Lew and Sherry Hay  
Mr. Berton Korman  
Dr. Rene Lerer  
Robert, Jon, and Lori Levinson  
H. Irwin Levy  
Mr. Mark Maisto  
Mr. John Marasco  
Arthur and Susan Menor  
Mr. and Mrs. Brand and Pamela Meyer  
Mr. and Mrs. Jack Nicklaus  
Ms. Heather Nisbeth  
Mr. Steve Nudelberg  
Mr. and Mrs. James E. Perrella  
Ms. Christine Petranichuk  
Nancy and Steve Schwartz  
Mr. Greg Seelagy  
Mr. Eric Silagy  
Mr. Lawrence Silverstein  
Mr. Jeffrey Sopshin  
Mr. William Striebe  
Mr. Robert Thibault  
Mr. Keith A. VanderVeen  
Mr. Thomas Vining  
Mr. and Mrs. Roger Walcott  
Mr. Peter Wellman  
Meryl and Charles Witmer  
Mr. William L. Yeager

If we have inadvertently made an error or omission, please accept our sincerest apologies. So we may correct the oversight, please contact: Danielle Hanson, Vice President of Major Gifts and Planned Giving, at 561-375-6649 or [DanielleHanson@UnitedWayPBC.org](mailto:DanielleHanson@UnitedWayPBC.org)



## JOIN US FOR OUR UPCOMING TOCQUEVILLE EVENTS!

### DECEMBER 6 | 6:00PM - 8:00PM Cocktail Reception and Conversation with Harvey E. Oyer III

Harvey Oyer, a fifth generation Floridian, accomplished attorney, lecturer, writer, and historian, has earned numerous professional and community awards, including being named one of the "100 Most Influential Floridians" by Florida International Magazine and has written or contributed to numerous books and articles about Florida history.

Hosted by Tocqueville Society members  
Bill & Mary Donnell and Brett & Brijin Frazee



### FEBRUARY 22, 2019 United Way Day at The Honda Classic PGA National Resort & Spa

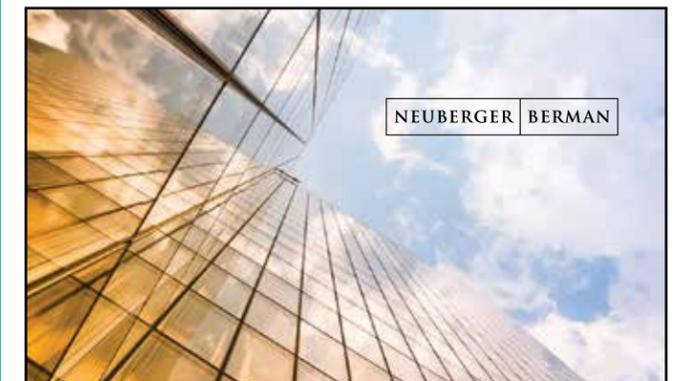
Join us for an exclusive United Way Day for Tocqueville Society members at The Honda Classic in our Skysuite overlooking the 18th hole. Enjoy perfect sightlines to watch every approach shot and putt from our private covered suite, featuring complimentary catering and a full bar.

Limited availability. More details to follow.

To RSVP:  
Martina Brief 561.375.6679  
[MartinaBrief@UnitedWayPBC.org](mailto:MartinaBrief@UnitedWayPBC.org)



*Thank you to our  
generous lunch sponsor!*



### Neuberger Berman is proud to support United Way and Tocqueville Tuesday

Neuberger Berman manages equity, fixed income, quantitative and multi-asset class, private equity and hedge fund portfolios for institutions, advisors and individual investors globally. Our diverse 1,900-employee workforce is committed to delivering compelling investment results for our clients over the long term. Private and 100% employee-owned, we were ranked #1 in *Pensions & Investments'* 2016 Best Places to Work in Money Management survey.

All information is as of September 30, 2017. Neuberger Berman Investment Advisers LLC is a registered investment adviser.  
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## SEPTEMBER 26



Kim Jones, Celedinas Insurance Group, United Way of Palm Beach County Board Chair; Dr. Donald Fennoy, The School District of Palm Beach County; Laurie George, United Way of Palm Beach County, Tocqueville Society member

The 6th annual Breakfast of Champions at the Kravis Center brought together the true champions in our community: the local businesses that run employee giving campaigns, the nonprofit organizations that are funded by United Way, community leaders and partners. Breakfast of Champions signifies the start of a new fundraising season and serves as a reminder that change is possible when we are united in the fight for our children's futures. This signature breakfast celebrated the joint accomplishments of United Way and the School District of Palm Beach County in education. Thanks to our combined efforts, more students are being mentored and more high school graduates are beginning and completing post-secondary credentials.



Marti LaTour, George Elmore, Hardrives, Inc., United Way of Palm Beach County Board member, Tocqueville Society member



Jon Levinson, REL Enterprises, United Way Board member, Tocqueville Society member; Donna Quinlan, United Way of Palm Beach County, Bob Bertisch, Legal Aid Society

## OCTOBER 23

Tocqueville members enjoyed an inspiring evening with guest speaker, Karl Zinsmeister, author of The Almanac of American Philanthropy. Mr. Zinsmeister shared how philanthropy is uniquely American, deeply rooted in our pioneering and entrepreneurial spirit. He discussed several examples in our history that illustrated how philanthropy is built on three concepts: great donors, great accomplishments, and great ideas. He spoke of the tremendous impact the nonprofit sector has on our GDP, surpassing even that of military and defense. He also reminded us that donations from individual citizens account for 80% of total giving, and that together, we are making a measurable difference in our communities.

Generously sponsored by



Danielle Hanson, United Way of Palm Beach County; Karl Zinsmeister



Bret and Brijin Frazee, Tocqueville Society members



George and Mary Giguere, Tocqueville Society members; Karl Zinsmeister



Patrick Morris, Wells Fargo; Laurie George, United Way of Palm Beach County, Tocqueville Society member



Sergio Mariaca, Mariaca Wealth Management; Jon Levinson, REL Enterprises, Tocqueville Society member and United Way of Palm Beach County Board member